

**Training and Technical Assistance Subcommittee**  
**Meeting Minutes**  
**08/19/03**  
**10:00 – 3:00**

Attendees: Theresa Fosbinder, Cindy Booth, Dave Hippler, Sara Edmonds, Gerry Mayhew, Donna King, Staci Wanty, Mary Oberer, Margaret Romens, Susan Rusboldt, Deb Solis, Vanessa Robertson, Keli Poppy, Lynn Jones-Richard

**HOUSEKEEPING & GROUND RULES**

Theresa Fosbinder is the state co-chair of this committee. There is still a need to appoint a county co-chair.

Theresa Fosbinder talked about the structure of this meeting. She would like to take turns taking minutes. Someone suggested bring a laptop to make this easier.

**DHFS BACKGROUND AND OVERVIEW OF IM GOALS AND OBJECTIVES**

Theresa talked about the IMAC and subcommittees. She indicated that there was an IMAC website where we would post meeting minutes and handouts.

<http://www.imac.state.wi.us/>

Theresa talked about relationships, with DWD and Gerry Mayhew, and with the UW-Oshkosh and PAC staff.

Theresa handed out a copy of the DHFS: Income Maintenance Outlook PowerPoint presentation dated June 2003. The group reviewed DHFS' goals and objectives.

Theresa gave an explanation of IM administration in DHFS.

Among other things, the Division of Health Care Financing is responsible for all IM eligibility, policy, systems, and related functions.

There are 2 bureaus in DHCF managing IM – the Bureau of Health Care Eligibility (BHCE) and the Bureau of Income Maintenance Administration (BIMA). Currently, BHCE is responsible for policy (both MA and FS), systems (both MA and FS), and communications (Call Center, Training, Tech writers, and Web). BIMA is responsible for administration, contracts, Quality assurance, EBT, fraud, outreach and CAPO.

The final realignment of the bureaus and potential bureau name changes is pending approval by DOA.

**IMAC OVERVIEW**

At the end of 2002, the IMAC and its subcommittees were reviewed. The names of some and the direction of others was changed. As part of this review, the IMAC Training and Technical assistance subcommittee was created with the original intent to “evaluate all aspects of the training and technical assistance service delivery model of the Income maintenance agency workforce...”.

Admin Memo 03-05 (Income Maintenance Advisory Committee) dated 07/07/03 was handed out for review. The charter and activities for this subcommittee as stated in the memo were discussed.

### **REVISIONS TO CHARTER AND ACTIVITIES**

The group discussed the charter and activities as stated in Operations memo 03-05 and revised them as follows:

Original charter:

This subcommittee was created in 2003 to evaluate all aspects of the training and technical assistance service and delivery model for Income Maintenance agency workforce. This includes the availability and timeliness of training and technical assistance for all experience levels of IM workers.

**Revised charter:**

**This subcommittee was created in 2003 to impact all aspects of training and technical assistance services to local agency and their workforce according to individual needs to achieve better program integrity and customer service.**

Original Activity list

1. Create inventory of IM worker experience levels
2. Create inventory of training currently available at each level
3. Determine the technical assistance needs of the local agencies
4. Provide a suggested service delivery model for both training and technical assistance.

**Revised activity list:**

- 1. Identify and quantify training and technical assistance needs.**
- 2. Provide input regarding training and technical assistance development.**
- 3. Evaluate delivery methods and recommend most efficient methods based on agency needs.**
- 4. Evaluate and give recommendations regarding required training. (Hourly requirement vs. course completion and Mandatory vs. non-mandatory).**
- 5. Evaluate training effectiveness and impact of training.**

While discussing one of the activities –“ review the training list for each worker” – other issues were addressed. We need listings of how many counties have “blended” workers? How many workers in these counties? How many small counties are there and how many workers in each of these counties?

### **TRAINING VS. TECHNICAL ASSISTANCE**

The group discussed the need to better blend training with technical assistance services (like those offered by the PAC team).

In order to further that discussion, the group discussed the differences and similarities between training and technical assistance:

<b>Training</b>	<b>Technical Assistance</b>
Reaches a global audience	Has more individualized design
Is long term – takes longer to absorb what learned	Has immediate impact
Considered adult learning	Is specific – apply info to a specific problem
Generic	Case specific
	There is usually follow-up after training for specifics

There are many ways that training and/or technical assistance can be delivered. We need a complete list of all methods – some that were mentioned include:

- Call Center
- On-line CBT
- New worker website
- PowerPoint Presentations
- Sit with mentor
- PAC services
- Operations/Administrator's Memos
- Classroom

This group can make recommendations on what training and technical assistance is, and how those providing training and those providing technical assistance can work better together.

### **PATHORE UPGRADE**

Pathlore (f.k.a. Registrar) is currently in use as a registration system. There will soon be a software upgrade which will allow it to become "learning management system"

A learning management system manages classroom based and e-learning resources, courseware and events. It allows not only tracking and registration, but creation and deployment of web based materials.

A Learning Management System is software that automates training events and can not only allow for registration, but can:

- Create CBTs
- Conduct classroom management
- Assess competency
- Do certification
- Allow mentoring
- Include chat and discussion boards

- Allow for connection to a broader management strategy – like connections with CARES, NEWMAN, PAC Database

Pathlore will allow for increased availability of distance learning opportunities, as well as better management and tracking of all types of training.

In the meantime, distance learning opportunities will be made available as possible, including the FS Application Processing “Essential Elements of Eligibility” 3 part course this fall.

Examples of Pathlore functionality:

Ability to search by topic e.g., “Alerts” - the system will display what types of training are available, e.g., 2 Classroom, Chatroom, and PowerPoint presentation.

Pathlore needs to know who you are and what you do (what county, what combination of programs do you administer, etc) and can track and produce training and potentially management reports accordingly.

Counties hope Pathlore will be able to monitor agency requirements, how close a person is to completing New Worker, how close to completing required training.

A question was asked about staff signing up for courses via Pathlore on their own, without supervisory approval. We think that Pathlore has features that allow supervisory intervention if an agency requires it, so that emails and/or approval requests could be sent to the supervisor when students sign up. We will be finding out more about Pathlore capability and will let this group know. In the meantime it is advocated that agencies continue to follow their internal training sign up procedures.

Gerry Mayhew shared with the group that there will be a new domain (location on the web) given to the training website. This will allow for better collaboration between the departments and they offer IM and Workforce development training. When the website changes it will get a new identity, and the new web address and any new features will be marketed appropriately so that people are aware of the changes.

## **DISTANCE LEARNING /BLENDED LEARNING**

- Theresa talked about distance learning as a priority for IM training. Distance and blended learning can be leveraged to keep travel time and costs to a minimum while still achieving all the desired results of training programs.
- The group talked about blended learning. Overall thoughts:  
Possibly get a power point presentation for background and then have face-to-face as follow-up. There are software packages that are interactive. There is a blackboard whiteboard. There are chat rooms for follow-up training

questions. It is possible that the role of the regional trainer may change. It would be nice to have follow-up support after receiving an operations memo.

- There should be certain training situations for certain training (e.g. it may be decided that soft skills only should be face-to-face). There will be different training needs or delivery by county. This group should have input into which types of training would be better suited to go to distance learning i.e., New Worker, New Initiatives, systems training).
- The group should review the training website to become familiar with it for future conversations. <http://www.dwd.state.wi.us/destrain/trainsec/>

## **GENERAL TOPICS**

- Counties are talking about change centers and using floating leads. Maybe “How to organize your day” would be a good follow-up after New Worker training. Now that we have change centers, possible a training on “How does this change your workday” would be good.
- Discuss of best practices might be good. Possibly having Bulletin boards so counties can help each other. Agencies would like more support for the ATLS.
- Sara Edmonds wanted feedback on the “Reduced Change Reporting” power point presentation.
- Program Integrity as a cohesive strategy
- Communications – Counties like the Eligibility Management website.
- CARES Web user interface: The plan is to construct a web based entry process for some subsystems in CARES. The first subsystems put on the web be Client Registration and AE. DWD has been invited to use the web base interface system with DHFS.

## **COMMUNICATION AND NEXT STEPS**

On an ongoing basis, this group will make recommendations about training and technical assistance delivery, strategies, etc., and get them to the main IMAC and/or to those involved in the training management process (i.e. Theresa and Gerry) as appropriate.

Topics for the group to consider in the immediate future, starting with the next meeting, include:

- Receive a Pathlore update and demo to have input into that upgrade process
- Assist in developing needs assessments
- Evaluate and make recommendations on training requirements for 2004 (should max hours be reconsidered in light of distance learning; mandatory vs. non mandatory training)

- Review training methods available so that better recommendations can be made about training delivery methods
- Make recommendations on what training and technical assistance is, and how those providing training and those providing technical assistance can work better together.

NEXT MEETING WILL BE IN SEPTEMBER – MORE INFORMATION TO FOLLOW.